



Interlibrary Loan and WorkFlows

Incoming ILLs:

1. In the Circulation module, in the Item group, you will be using the Add Brief Title wizard.
2. First, you want to check the properties. **Right click** on the Add Brief Title wizard.

The **Format** and **Use entries** should both be **brief**, as this will be a short record with just the information you need to circulate the item once to the patron who made the request.

Shadow Title should be **checked** so that no other patrons can put a hold on this item. If other patrons want the item, they will need to do a second ILL.

Circulate should also be **checked** so the patron who requested the item can check it out.

Permanent should be **unchecked**, as this is a temporary record that will be deleted once the item is sent back to the lending library.

We recommend that you use the **ILL-MAT** (ILL Materials) type as this will help with statistics at the end of the fiscal year.

You can also fill in anything else that will save you time while processing a stack of ILLs in the Home Location and Optional Fields (Item cats).

3. Now you can click **OK** to save your preferences.
4. Open the Add Brief Title wizard (there is usually a short delay when opening this wizard).
5. There is a top section and a bottom section to the wizard. The top section is the Title info and the bottom section is the Call number and copy info.
6. The only thing you need to put in the Title info (top section) is the title. ILLs should all have a title of "ILL TITLE IN ALL CAPS". This lets everyone in the system know that this record is an ILL and they should not attach their items to it.

Adding ILL Records (cont.):

The Title is the only required field in this top section. It must be "ILL NAME OF BOOK IN ALL CAPS".

You can use the other fields in the top section for other information, like the name of the library you borrowed the item from, if you want. Or you can leave them blank.

Your Call number can be AUTO or a specific number that you use for ILLs, maybe a code that explains where the item came from.

Your Item ID can be AUTO or a specific number that you use for ILLs, like a laminated card with a barcode.

7. In the bottom section, you need to fill in a call number and Item ID.
8. The Call number can be AUTO generated (just type in "AUTO") or you can fill in a specific call number if you prefer. Some libraries use a call number code that indicates where the item was borrowed from.
9. The Item ID can again be AUTO generated and then written down on an item jacket or slip, or it can be scanned in from a temporary barcode bank if your library has chosen to address ILLs in this manner.
10. Now click **Add Brief Title** at the bottom. That will save it.
11. You can now check that item out to the patron who borrowed it.

NOTE - Many people use the Modify Due Date helper at the top of the Checkout wizard to create a special due date for the ILL item that allows for time for you to process the return and send the item back on time. Choose "For this checkout only" and use the gadget to set the date.



12. Find or scan the item and choose **Checkout item to user**.

13. Now WorkFlows will do all the usual things for the checkout like record checkout stats, send due date notices, send overdue notices, and impose fines for late items, if your library normally does any of those things.

Returning ILLs:

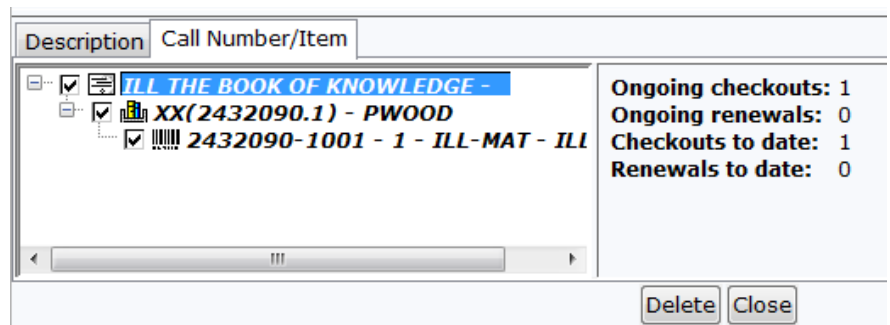
1. When the item comes back, check it in using the Checkin wizard like you normally would.
 - The item will route back to the location that you assigned it when you created it. So in my example, it will automatically route to ILL-IN-MT.

List of discharges							
<input checked="" type="checkbox"/> Select All				Total amount billed: \$0.00			
Title	Item ID	Route/Tr...	Amount B...	Amount P...	Amount P...	Select »	User
ILL THE B...	2432090-...	ILL-IN-MT					098

2. Now you want to take the item out of the system (and mail it back), because it is no longer part of your collection. Open Delete Title, Call Numbers or Items wizard (in the Cataloging Module > Title Maintenance group).
 - You don't need to Discard the item because it was a brief title in the first place, so it was never added to OCLC.

[\(Discard vs. Delete video\)](#)

3. Search for your item or scan the Item ID.
4. Click in the top checkbox of the item tree to select the entire record. Then **Delete**.



Lending ILLs: The Two methods

Method One

Create library cards for every library you lend to.

- ◆ We can set those cards up so they do not accrue fines.
- ◆ You have to purge these users periodically to remove those that have not checked out in a long time.
- ◆ These users do count towards your user count for MSC billing purposes.
- ◆ Be careful that there are not multiple cards for one library.

Method Two

Create one or two general cards for ILL in Montana and/or ILL Out of State

- ◆ You then have to keep track of which library has which item in a separate spreadsheet or one of those extra places in WorkFlows that are mentioned above (author, call number).
- ◆ Billing individual libraries has to be done by hand.